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CITRUS

JANUARY FORECAST MATURITY TEST RESULTS AND FRUIT SIZE



FLORIDA
AGRICULTURE

January 12, 2004

ALL ORANGES NOW AT 250.0 MILLION BOXES

In a report issued by the USDA Agricultural Statistics Board, the forecast of all oranges is lowered to 250.0 million boxes. This reflects a decrease of 2.0 million boxes in the forecast of early-midseason varieties while the forecast for Valencia oranges remains at 118.0 million boxes. In the past 10 seasons, the January forecast has differed from actual production by an average of 2.5 percent, with six seasons higher and four lower.

The month of December was a peak harvesting month for early and midseason varieties with weekly certifications exceeding 7.9 million boxes except for the Christmas week. Estimated utilization to January 1, with an allowance for gift fruit and other use, has passed 60.0 million boxes. Harvest figures do not include the later maturing Valencia oranges. A brief period of very warm temperatures occurred at the end of the month but temperatures have returned to more reasonable levels.

EARLY-MIDSEASONS REDUCED TO 132.0 MILLION BOXES

The early-midseason-Navel orange forecast is decreased 2.0 million boxes, or 1.5 percent, to 132.0 million boxes. The Navel portion of the crop continues at 4.8 million boxes. Results from the size and drop surveys conducted in December show that the accepted droppage rate is higher and the average size is smaller than previously projected, thus requiring six more pieces of fruit to fill a 90-pound box.

The first route survey (Row Count) was conducted on December 29-30. At 46 percent, the weighted percentage of rows harvested is lower than last season for

Citrus production, January 1, 2004
forecasts by varieties and states, with comparisons

Crop and State	Production		Forecast	
	2001-02	2002-03	Dec 11, 2003	Jan 12, 2004
--- 1,000 boxes ---				
Early, Midseason, and Navel Oranges:				
FLORIDA	128,000	112,000	134,000	132,000
California	32,000	41,000	39,000	39,000
Texas	1,530	1,350	1,300	1,300
Arizona	270	200	220	220
Total Above Varieties	161,800	154,550	174,520	172,520
Valencias:				
FLORIDA	102,000	91,000	118,000	118,000
California	19,500	21,000	20,000	19,000
Texas	210	220	250	230
Arizona	250	270	250	250
Total Valencias	121,960	112,490	138,500	137,480
All Oranges:				
FLORIDA	230,000	203,000	252,000	250,000
California	51,500	62,000	59,000	58,000
Texas	1,740	1,570	1,550	1,530
Arizona	520	470	470	470
Total All Oranges	283,760	267,040	313,020	310,000

FORECAST DATES 2003-04 SEASON

February 10, 2004	March 10, 2004
April 8, 2004	May 12, 2004
June 11, 2004	July 12, 2004

early-mids, but is higher than the five prior seasons. Over three-fourths of the Navel rows are harvested, more than in the previous five seasons at this time. With reports of fruit drying, final utilization may depend on the usability of the remaining fruit.

Components used in the January Forecast

Type	Bearing trees	Fruit per tree	Percent droppage	Fruit per box
	(1,000)			
Early-Mid	32,161	1,236	10.9	245
Navel	2,158	379	9.1	129
Valencia	41,572	684	12.5	198

VALENCIAS STAY AT 118.0 MILLION BOXES

The forecast for the late maturing Valencia oranges is unchanged at 118.0 million boxes. Fruit sizes continue above average though not as large as last season. Droppage, which has been below average all season and is currently near the minimum of the previous 10 seasons, is projected to be lower than seven seasons in that series. Objective survey regressions continue to support this record forecast which is 30 percent greater than the harvest of 2002-03.

FCOJ YIELD NOW 1.53 GALLONS PER BOX

The projection of yield of FCOJ for all oranges is reduced from 1.55 gallons per box to 1.53. The early-mid portion is projected to yield 1.47 gallons and the Valencia portion 1.60 gallons. Last season's final yield as reported by the Florida Citrus Processors Association was 1.54 gallons for all oranges, 1.49 for the early-mid portion and 1.61 for Valencias.

Reports of fruit drying is reflected in the relatively low season to date yields as reported by the Association. Additionally, Maturity test results reported on page 3 of this release confirm continued drying of fruit remaining to be harvested.

GRAPEFRUIT NOW 40.0 MILLION BOXES

The forecast of grapefruit for certified utilization (including an allocation of 1.5 million boxes of gift fruit and local sales) is decreased 1.0 million boxes to 40.0 million. The reduction is in the white varieties, from 17.0 million boxes to 16.0 million. If realized, this will be only three percent more than last season's 38.7 million boxes

With the decrease, the forecast for **white** grapefruit is slightly less than last season's harvest. Average fruit sizes for white grapefruit are projected to be smaller than in earlier forecasts and smaller than the 10 season average of 86 pieces of fruit per box. It will now take 91 pieces of fruit to fill a standard field box compared to 85 in December and 81 in October. This season's growth rate has followed a pattern similar to last season and both differ from the previous nine seasons. Projected droppage rates remain at the average which is nine percent. Utilization to the first of the month is estimated at 2.1 million boxes.

The **colored** grapefruit forecast is continued at 24.0 million boxes. Fruit sizes, following a similar pattern to last season when the rate of growth was above average early in the season then slowed, continue to be less than the

average. Currently, it is projected to require 100 pieces of fruit to make a standard field box instead of the 91 pieces used in the initial October forecast. If realized, only two seasons out of the past ten will have had smaller sizes. Droppage rates continue to be projected near normal levels. Utilization to the first of the month is estimated at 7.1 million boxes, only slightly less than last season to the same time.

Components used in the January forecast

Type	Bearing trees	Fruit per tree	Percent droppage	Fruit per box
	(1,000)			
White Grapefruit ^{1/}	3,333	497	9.0	91
Colored Grapefruit	5,461	503	11.0	100

^{1/} Seedless variety only.

ALL TANGERINES 6.7 MILLION BOXES

The forecast of all tangerines is continued at 6.7 million boxes. Forecasts for the early varieties (**Fallglo and Sunburst**) and the later maturing **Honey** variety are unchanged.

Fallglo harvest is complete with slightly less than 700,000 boxes estimated to have been used in fresh and processing channels. Sunburst tangerines continue to be harvested with the latest weekly amounts ahead of last season. All early tangerine utilization is estimated to be 3.4 million boxes to the first of the month, ahead of the 3.0 million boxes estimated to the same time last season.

Fruit sizes of Honey tangerines continue to be large and are projected to be larger at harvest than all but one of the previous ten seasons. Droppage rates continue as projected and would be slightly less than the 10 season average of 39 percent. Harvest has started with about 100,000 boxes certified for fresh use and processing, slightly less than last season to the same time.

TEMPLES STAY AT 1.4 MILLION BOXES

The Temple forecast remains at 1.4 million boxes which is eight percent more than the 1.3 million box crop recorded last season. If attained, it will equal the freeze affected 1989-90 harvest and surpass only 2000-01 and last season. Although fruit per tree has increased 22 percent from last season, droppage is near normal levels, fruit sizes are below average, and tree numbers are down nine percent from last year.

TANGELOS REMAIN AT 1.3 MILLION BOXES

The tangelo forecast is unchanged at 1.3 million boxes. This will be the smallest amount of harvest since the 1965-66 season. Fruit sizes are near the largest of the previous ten seasons and droppage is below average. A route survey (Row Count) conducted on December 29-30 fully supports the forecast level. Estimated utilization to the first of the month is 650,000 boxes.

Citrus production, January 1, 2004
forecasts by varieties and states, with comparisons

Crop and State	Production		Forecast	
	2001-02	2002-03	Dec 11, 2003	Jan 12, 2004
--- 1,000 boxes ---				
Grapefruit:				
FLORIDA-All	46,700	38,700	41,000	40,000
White ^{1/}	18,900	16,200	17,000	16,000
Colored	27,800	22,500	24,000	24,000
Texas	5,900	5,650	5,300	5,200
Arizona	160	130	90	100
California	5,900	5,600	5,500	5,300
Total Grapefruit	58,660	50,080	51,890	50,600
Lemons:				
California	18,300	24,000	23,000	23,000
Arizona	2,800	3,000	3,000	3,200
Total Lemons	21,100	27,000	26,000	26,200
Limes: Florida	150	^{2/}	^{2/}	^{2/}
Temples: Florida	1,550	1,300	1,400	1,400
Tangelos: Florida	2,150	2,350	1,300	1,300
K-Early: Florida	30	^{2/}	^{2/}	^{2/}
Tangerines:				
FLORIDA-All	6,600	5,500	6,700	6,700
Early ^{3/}	4,350	3,000	4,400	4,400
Honey	2,250	2,500	2,300	2,300
California ^{4/}	2,200	2,500	2,500	2,500
Arizona ^{4/}	620	430	600	600
Total Tangerines	9,420	8,430	9,800	9,800

^{1/} Includes seedy. ^{2/} No forecast. ^{3/} 2001-02 -- Robinson, Fallglo, Sunburst, and Dancy; 2002-03 production and 2003-04 forecast -- Fallglo and Sunburst only. ^{4/} Includes tangelos.

UNADJUSTED MATURITY TESTS: Average of regular bloom fruit from sample groves, 2002-03 and 2003-04 seasons

Fruit type (No. groves) test date	Acid		Solids (Brix)		Ratio		Unfinished juice per box		Solids per box	
	2002-03	2003-04	2002-03	2003-04	2002-03	2003-04	2002-03	2003-04	2002-03	2003-04
	Percent		Percent				Pounds		Pounds	
Juice and solids per box are unadjusted and not comparable to plant test results.										
ORANGES:										
Early (42-54)										
Sep 1	1.37	1.24	9.43	9.26	7.03	7.58	43.66	42.32	4.12	3.92
Oct 1	0.92	0.86	9.89	9.69	10.98	11.49	51.02	49.53	5.04	4.80
Nov 1	0.74	0.76	10.46	10.46	14.47	14.07	52.26	51.32	5.46	5.37
Dec 1	0.75	0.67	11.25	11.36	15.26	17.26	49.04	50.88	5.51	5.77
Jan 1	0.70	0.67	11.60	11.53	16.81	17.60	51.51	49.24	5.97	5.69
Mid (43-41)										
Sep 1	1.44	1.45	8.99	9.33	6.35	6.52	45.98	44.19	4.13	4.13
Oct 1	1.03	1.06	9.55	9.73	9.52	9.30	52.68	49.08	5.03	4.78
Nov 1	0.83	0.89	10.34	10.71	12.77	12.20	54.56	52.25	5.64	5.59
Dec 1	0.79	0.78	11.23	11.72	14.46	15.29	53.17	52.09	5.97	6.10
Jan 1	0.76	0.80	11.84	12.04	15.87	15.40	52.41	51.37	6.21	6.18
Late (150-150)										
Sep 1	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Oct 1	2.04	2.01	8.70	8.92	4.34	4.47	48.96	46.28	4.26	4.13
Nov 1	1.64	1.63	9.23	9.55	5.72	5.91	52.37	51.07	4.83	4.88
Dec 1	1.42	1.40	10.05	10.38	7.19	7.53	53.19	53.45	5.35	5.55
Jan 1	1.24	1.26	10.85	11.13	8.86	8.94	54.28	53.39	5.89	5.95

NOTICE: All samples were run through an FMC 091 machine using mechanical pressure only. This machine utilizes a .040 short strainer and standard 5/8-inch orifice tube. The beam settings are also identical to past tests and no restrictors are used.

Maturity test averages by areas, January 1, 2004

Fruit type	Groves sampled	Acid	Solids (Brix)	Ratio	Unfinished juice per box	Solids per box
	Number	Percent	Percent		Pounds	Pounds
ORANGES:						
Early						
Indian River Dist.	4	0.77	12.31	16.24	51.77	6.38
Other Areas	50	0.66	11.47	17.71	49.04	5.63
Midseason						
Indian River Dist.	10	0.78	12.07	15.58	52.06	6.28
Other Areas	31	0.80	12.03	15.34	51.15	6.15
Late						
Indian River Dist.	26	1.28	11.33	8.99	53.72	6.09
Other Areas	124	1.25	11.09	8.93	53.32	5.92

FRUIT SIZE COMPARISONS BY TYPES TO PREVIOUS SEASONS

Size frequency distributions are from the December size survey conducted in sample groves during the period of December 4 through 24, 2003. The distributions are by percent from fruit within the size range of each 4/5 bushel container. These frequency distributions relate only to fruit from spring bloom and exclude summer bloom fruit in all seasons.

Florida Citrus: Size frequency distributions from December measurements			
Type of fruit and size in 4/5-bushel containers	2001	2002	2003
--- Percent ---			
Early and midseason oranges: (excluding Navels)			
64 and larger	3.3	6.7	4.3
80	9.4	23.0	13.4
100	31.4	37.9	32.5
125	33.2	23.0	31.2
163 and smaller	22.7	9.4	18.6
Valencia oranges:			
64 and larger	4.1	13.3	8.2
80	18.8	35.1	26.6
100	39.9	36.8	41.0
125	26.0	12.7	19.3
163 and smaller	11.2	2.1	4.9
White seedless grapefruit:			
32 and larger	10.2	33.0	13.6
36	16.8	22.3	20.4
40	21.5	20.1	24.9
48	20.4	11.3	16.2
56	14.2	6.0	9.6
63 and smaller	16.9	7.3	15.3
Colored seedless grapefruit:			
32 and larger	3.9	20.5	8.6
36	10.8	22.2	16.1
40	21.1	23.3	25.7
48	22.6	15.9	20.6
56	16.1	7.8	12.9
63 and smaller	25.5	10.3	16.1
Honey tangerines:			
80 and larger	39.4	29.4	40.8
100	31.0	34.2	32.7
120	20.1	23.4	16.7
176	6.3	7.3	4.7
210 and smaller	3.2	5.7	5.1
Templets:			
80 and larger	21.1	62.6	31.3
100	41.6	28.6	36.9
120	28.8	7.1	19.4
156 and smaller	8.5	1.7	12.4

The charts below describe the relationships of the fruit size measurements with those taken in the previous year. The diameter measurements shown are the minimum values of each eighth inch range, except for the smallest values.

CHART 1: Early and midseason oranges (excluding Navels) size frequency by diameter from December measurements.

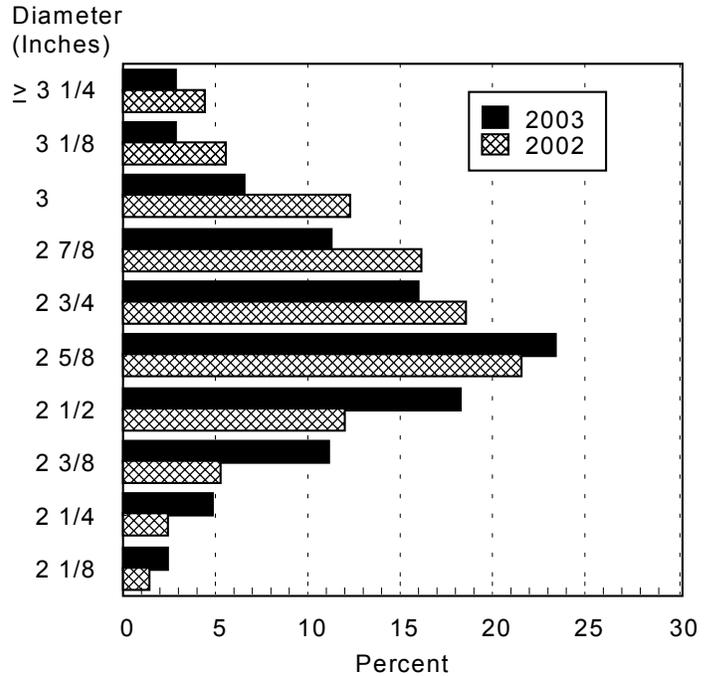


CHART 2: White seedless grapefruit size frequency by diameter from December measurements.

